inContact Workforce Management v2

Planner Web Site User Manual

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inContact WFM v2 Planner Web Site User Manual

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1. Overview

The WFM v2 Planner Website, which will be referred to simply as the Website, is the user interface for the Advanced Workforce Optimization Portal. Its basic function is to allow users to submit agent requirement requests to the Planner, to manage those requests, and to view the output (agent requirements and other data) from the Planner.

There are three classes of users who are accommodated in the Website. They are as follows:

- Administrators: These users are responsible for administering the Website, including configuring settings common to all Environments and Planning Requests, and managing and creating users. These users are also able to submit and manage Planning requests, and view Plans and other output data.
- Planners: These users are responsible for submitting requests to the Planner and for managing those requests. They are assigned one or more Environments (an Environment is a collection of contact groups, streams, and organizational units, or OUs) for which to manage schedule requests.
- Viewers: These users are given access to view the status of planning requests for Environments assigned to them, and to view the resulting plans and other data. They cannot, however, submit Planning requests.

This User Manual is organized by Website feature. The privileges of each user class are defined within the outline for each feature.

Complete details on common features of the Portal, logging in, changing passwords, etc, can be found in the *WFM v2 Scheduler User Manual*.

1.1. Browser Requirements

This web application is targeted for Microsoft Internet Explorer 6.0 or higher. In addition, cookies must be enabled for the application's authentication to function properly.

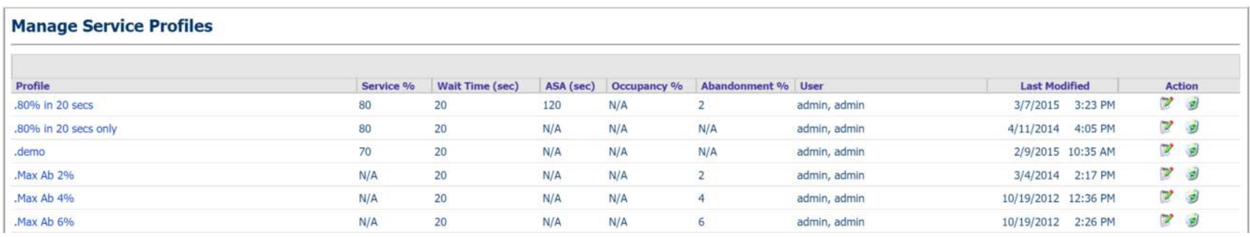
2. Service Profiles

A Profile is a set of configuration options for generating agent requirements. A user may create multiple profiles, each storing a different configuration, and use them to generate agent requirements for any environment. A profile is a convenient way for a user to set up a particular configuration once and then use that configuration to generate agent requirements. Thus, the user does not have to enter all the configuration parameters for each agent requirement generation.

Users that have an Administrator or Planner access level can create, edit, and delete profiles. Users with the Viewer access level can view the details of profiles associated with generated agent requirements for the environments assigned to them, but cannot create their own profiles, or edit or delete profiles. All users can view the details of a profile by following the link from the profile name on the *Manage Requirement Runs* page.

2.1. Profile Information

For users with Administrator or Planner access level, the *Service Profiles* choice appears in the *Planning -> Planner -> Profiles* menu. To view the *Service Profile Manager* module, click on the *Service Profiles* menu item. By default, the *Service Profile Manager* displays the list of profiles that the user has configured. This page should appear similar to as shown in Figure 2.1.



Manage Service Profiles

Profile	Service %	Wait Time (sec)	ASA (sec)	Occupancy %	Abandonment %	User	Last Modified	Action
.80% in 20 secs	80	20	120	N/A	2	admin, admin	3/7/2015 3:23 PM	
.80% in 20 secs only	80	20	N/A	N/A	N/A	admin, admin	4/11/2014 4:05 PM	
.demo	70	20	N/A	N/A	N/A	admin, admin	2/9/2015 10:35 AM	
.Max Ab 2%	N/A	20	N/A	N/A	2	admin, admin	3/4/2014 2:17 PM	
.Max Ab 4%	N/A	20	N/A	N/A	4	admin, admin	10/19/2012 12:36 PM	
.Max Ab 6%	N/A	20	N/A	N/A	6	admin, admin	10/19/2012 2:26 PM	

Figure 2.1 – Service Profile Manager

The following sections describe features of the *Service Profile Manager* in detail.

2.1.1. Profile List

By default, the *Service Profile Manager* displays the list of profiles configured by the user. For each profile, it displays the user's name, the name of the profile, Service Level, Average Speed of Answer, Occupancy, Abandonment, and the last modified date and time. For each profile, an icon button to delete the profile, and another icon button to enable editing the profile, is provided. Below the list of profiles is a form for creating a new profile.

2.1.2. Create New Profile

The user can create a new profile by entering a name for the new profile and then selecting the *Add Profile* button, as shown in Figure 2.2.

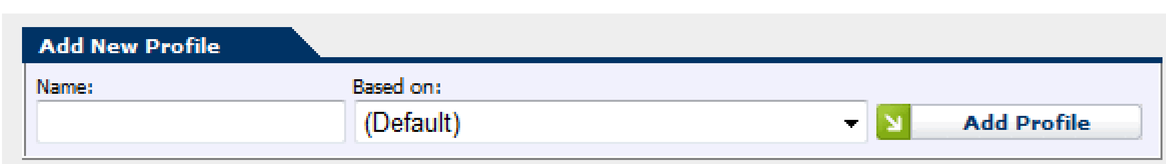


Figure 2.2 – Add New Profile

If there is an error creating the profile, a message will be displayed above the entry fields. If the profile is successfully created, then it will be opened immediately in the edit mode, as described in section 2.1.4, below. Upon returning to the *Service Profile Manager*, the new profile will appear in the profiles list

2.1.3. View Service Profile

One of the features provided by the *Service Profile Manager* module is the ability to view the details of a profile in a non-editable form. The user can view the details of a profile by selecting the link for the profile used for a scheduling run. Selecting the link for a profile causes the *Service Profile Manager* to display the details of the profile, as shown in Figure 2.3.

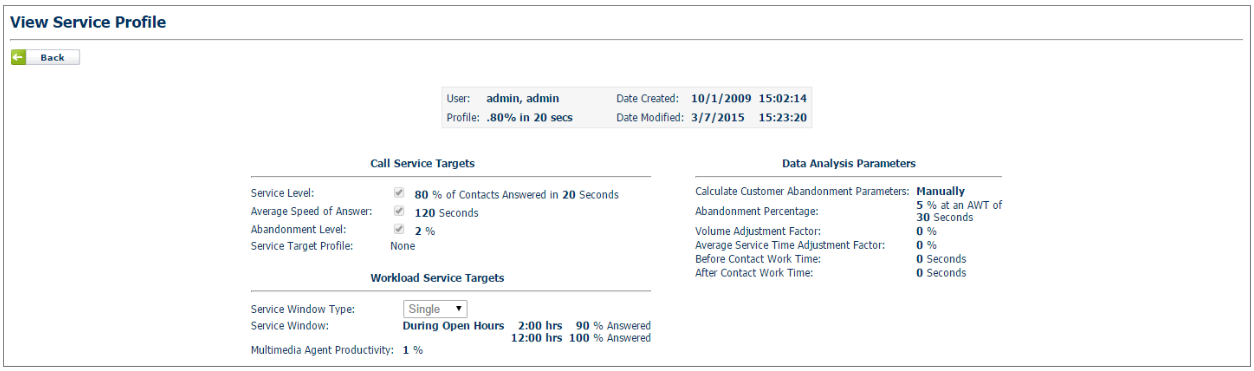


Figure 2.3 – Service Profile Details Displayed

The user may click on *Back* to close the detailed view for the profile and return to the profiles list.

2.1.4. Edit Profile

The *Service Profile Manager* allows the user to edit his or her profiles. The user can edit a profile by selecting the *Edit* icon button for a profile. When editing a profile, the page appears as is shown in Figure 2.4.

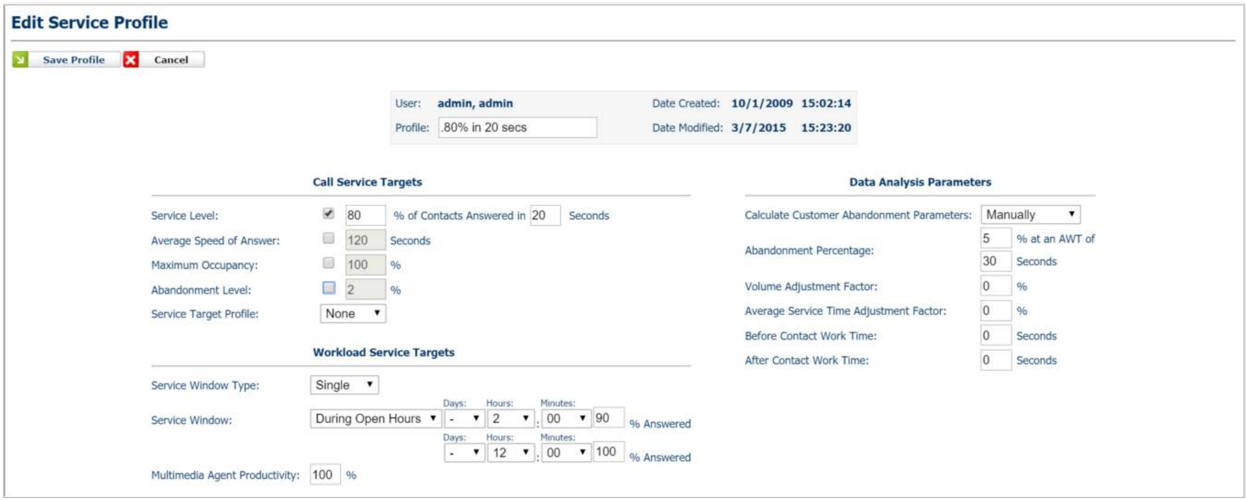


Figure 2.4 – Editing a Service Profile

To cancel editing of a profile without saving any changes entered since the most recent update, select the *Cancel* button. Following is a description for each of the configuration items in a profile.

2.1.4.1. Call Service Targets

The items grouped under Call Service Targets are used to configure the overall targets to be used by the agent requirements generation. They have a direct impact on the length of time it takes to generate agent requirements for an environment. One may select one or several optimization targets.

2.1.4.1.1. Service Level

To generate agent requirements with a specific Service Level target in mind, one should check the Service Level check box. Once Service Level is checked, you must also define a Percentage of Calls to be answered in a given time frame. These items default to 80% and 20 seconds.

2.1.4.1.2. Average Speed of Answer

To generate agent requirements where a specific Average Speed of Answer metric is the target, select Average Speed of Answer. Once this is selected, you must also supply the target ASA value in Seconds.

2.1.4.1.3. Maximum Occupancy

One may also use Maximum Occupancy level as a target for agent requirement generation. Select this value and then enter a target Maximum Occupancy level as a percentage.

2.1.4.1.4. Abandonment Level

If the Abandonment Level target is used, you must also supply the Abandonment Level target value as a percentage.

2.1.4.1.5. Service Target Profile

The Service Target Profile can be used to define very granular service target goals. The creation and management of Service Target Profiles is described in the *WFM v2 Scheduler User Manual.*

2.1.4.2. Workload Service Targets

The *Workload Service Targets* section identifies the service window characteristics to use when generating agent requirements for a Multimedia (email, fax, back office, etc.) contact group.

2.1.4.2.1. Service Window Type

The *Service Window Type* can be set to *Single* or *Multiple*.

2.1.4.2.2. Service Window

Service Window defines the *Service Window* in minutes. If *Single* is selected for *Service Window*, a single value is defined for this service window. If *Multiple* is selected, you must also define the *Service Span* and *After Hours Contacts* in minutes as seen below.

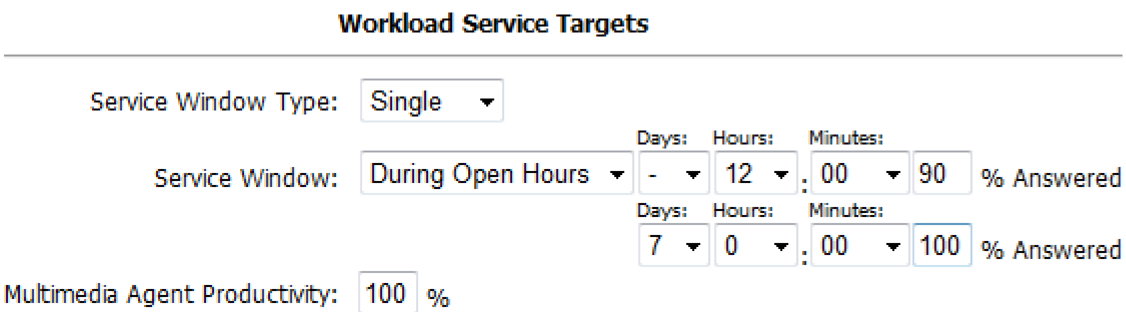


Figure 2.5 – Service Window

2.1.4.2.3. Multimedia Agent Productivity

Multimedia Agent Productivity defines the effectiveness of Multimedia Agents. Should you wish to increase or decrease the workload handled by such agents, you can adjust this value accordingly. By default it is set to 100%, which is a standard agent productivity level.

2.1.4.3. Data Analysis Parameters

The *Data Analysis Parameters* section identifies the data analysis parameters to use when generating agent requirements.

2.1.4.3.1. Abandonment Percentage

Abandonment Percentage is the expected rate at which contacts will be abandoned when they have been waiting for the specified *Average Wait Time (AWT)* measured in seconds.

2.1.4.3.2. Volume and Average Service Time Adjustment Factor

The *Volume* and *Average Service Time Adjustment Factors* allow the Contact Volume and Average Service Time values for each period to be adjusted by a fixed percentage. These values may be positive or negative.

2.1.4.3.3. Before and After Contact Work Time

The *Before* and *After Contact Work Time* values allow constant amounts of time to be pre-pended and appended to the average handling time values to account for time such as non-phone agent work time.

2.1.5. Save Profile

In order to save changes made to a profile, you must click the *Save* button. There are a number of reasons that saving a profile may not succeed. If invalid values or contradictory settings are specified by the user, one or more messages located near to the incorrect value or values will appear, asking the user to correct these values and resubmit the update. Furthermore, editing a profile while agent requirements are being generated is not allowed.

3. Allocation Profiles

An *Allocation Profile* is a set of configuration options used to define the distribution of workload across an environment. A user may create multiple profiles, each storing a different configuration, and use them when creating agent requirements for any environment. A profile is a convenient way for a user to set up a particular configuration once and then use that configuration to generate agent requirements. Thus, the user does not have to enter all the configuration parameters for each agent requirements generation.

Users that have an Administrator or Planner access level can create, edit, and delete profiles. Users with the Viewer access level can view the details of profiles associated with generated agent requirements for the environments assigned to them, but cannot create their own profiles, or edit or delete profiles. All users can view the details of a profile by following the link from the profile name on the *Manage Requirement Runs* page.

3.1. Allocation Profile Information

For users with Administrator or Planner access level, the *Allocation Profiles* choice appears in the *Planning -> Planner -> Profiles* menu. To view the *Allocation Profile Manager* module, click on the *Allocation Profiles* menu item. By default, the Allocation Profile Manager displays the list of profiles that the user has configured. This page should appear similar to as shown in Figure 3.1.

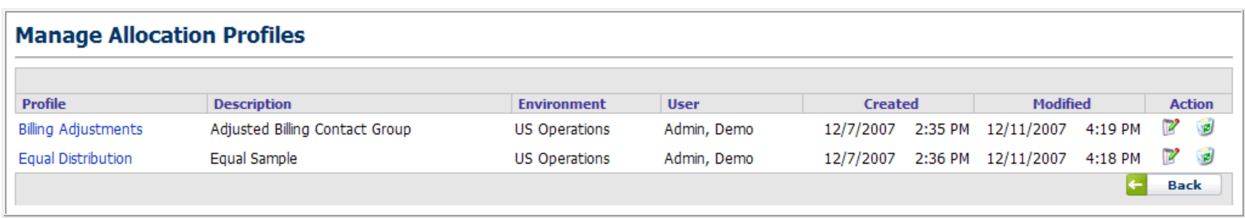


Figure 3.1 – Allocation Profile Manager

The following sections describe features of the *Allocation Profile Manager* in detail.

3.1.1. Profile List

By default, the *Allocation Profile Manager* displays the list of profiles configured by the user. For each profile, it displays the user's name, the name of the profile, the description of the profile, the environment, and the created and last modified dates and times. For each profile, an icon button to delete the profile, and another icon button to enable editing the profile, is provided. Below the list of profiles is a form for creating a new profile.

3.1.2. Create New Profile

The user can create a new profile by entering a name and selecting an environment for the new profile and then selecting the *Add Profile* button, as shown in Figure 3.2.

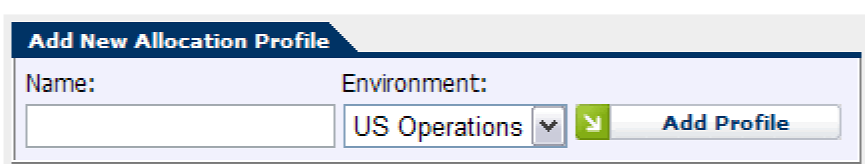
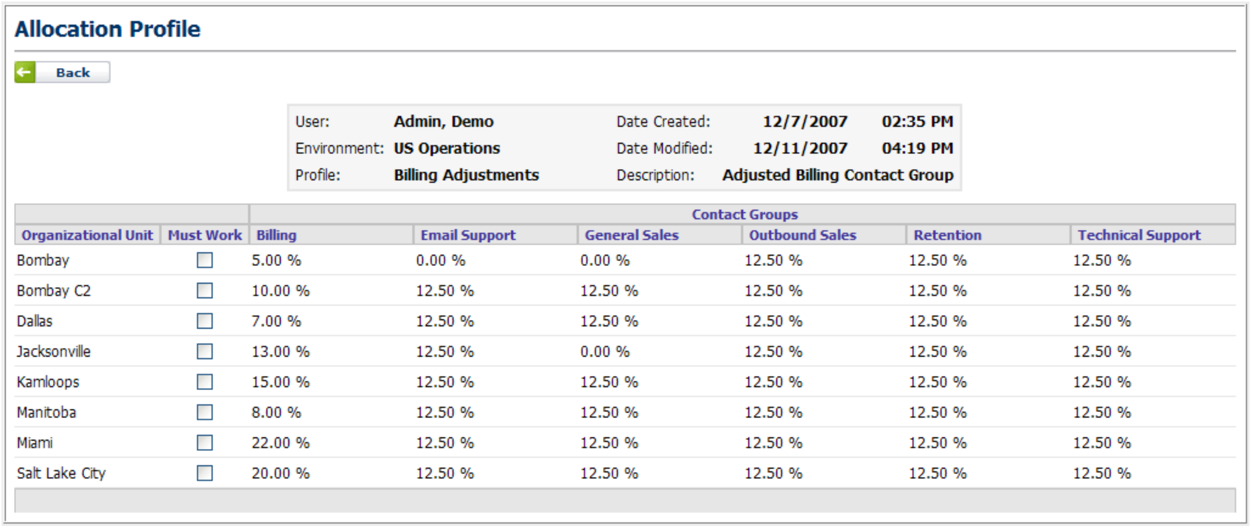


Figure 3.2 – Adding New Profile

If there is an error creating the profile, a message will be displayed above the entry fields. If the profile is successfully created, then it will be opened immediately in the edit mode, as described in section 3.1.4, below. Upon returning to the *Allocation Profile Manager*, the new profile will appear in the profiles list

3.1.3. View Profile Details

One of the features provided by the *Manage Requirement Runs* module is the ability to view the details of an allocation profile in a non-editable form. The user can view the details of a profile by selecting the link for the profile used for an agent requirements run. Selecting the link for a profile causes the *Allocation Profile Manager* to display the details of the profile, as shown in Figure 3.3.



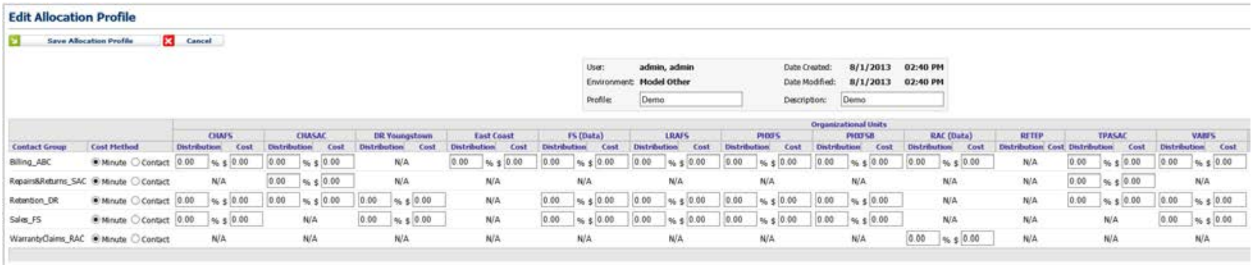
		Contact Groups					
Organizational Unit	Must Work	Billing	Email Support	General Sales	Outbound Sales	Retention	Technical Support
Bombay	☐	5.00 %	0.00 %	0.00 %	12.50 %	12.50 %	12.50 %
Bombay C2	☐	10.00 %	12.50 %	12.50 %	12.50 %	12.50 %	12.50 %
Dallas	☐	7.00 %	12.50 %	12.50 %	12.50 %	12.50 %	12.50 %
Jacksonville	☐	13.00 %	12.50 %	0.00 %	12.50 %	12.50 %	12.50 %
Kamloops	☐	15.00 %	12.50 %	12.50 %	12.50 %	12.50 %	12.50 %
Manitoba	☐	8.00 %	12.50 %	12.50 %	12.50 %	12.50 %	12.50 %
Miami	☐	22.00 %	12.50 %	12.50 %	12.50 %	12.50 %	12.50 %
Salt Lake City	☐	20.00 %	12.50 %	12.50 %	12.50 %	12.50 %	12.50 %

Figure 3.3 – Allocation Profile Details Displayed

The user may click on *Back* to close the detailed view for the profile and return to the profiles list.

3.1.4. Edit Profile

The *Allocation Profile Manager* allows the user to edit his or her profiles. The user can edit a profile by selecting the *Edit* icon button for a profile. When editing a profile, the page appears as is shown in Figure 3.4.



		Organizational Units											
		CHAFS		CHASAC		DR Youngstown		East Coast		FS (Data)		LRAFS	
Contact Group	Cost Method	Distribution	Cost	Distribution	Cost	Distribution	Cost	Distribution	Cost	Distribution	Cost	Distribution	Cost
Billing_ABC	● Minute ○ Contact	0.00 %	$ 0.00	0.00 %	$ 0.00	N/A		0.00 %	$ 0.00	0.00 %	$ 0.00	0.00 %	$ 0.00
Repairs&Returns_SAC	● Minute ○ Contact	N/A		0.00 %	$ 0.00	N/A		N/A		N/A		N/A	
Retention_DR	● Minute ○ Contact	0.00 %	$ 0.00	0.00 %	$ 0.00	0.00 %	$ 0.00	N/A		0.00 %	$ 0.00	0.00 %	$ 0.00
Sales_FS	● Minute ○ Contact	0.00 %	$ 0.00	N/A		0.00 %	$ 0.00	N/A		0.00 %	$ 0.00	0.00 %	$ 0.00
WarrantyClaims_RAC	● Minute ○ Contact	N/A		N/A		N/A		N/A		N/A		N/A	

	PHXFS		PHXFSB		RAC (Data)		RETEP		TPASAC		VABFS	
Contact Group	Distribution	Cost	Distribution	Cost	Distribution	Cost	Distribution	Cost	Distribution	Cost	Distribution	Cost
Billing_ABC	0.00 %	$ 0.00	0.00 %	$ 0.00	0.00 %	$ 0.00	N/A		0.00 %	$ 0.00	0.00 %	$ 0.00
Repairs&Returns_SAC	N/A		N/A		N/A		N/A		0.00 %	$ 0.00	N/A	
Retention_DR	0.00 %	$ 0.00	0.00 %	$ 0.00	N/A		N/A		0.00 %	$ 0.00	0.00 %	$ 0.00
Sales_FS	0.00 %	$ 0.00	0.00 %	$ 0.00	N/A		N/A		N/A		0.00 %	$ 0.00
WarrantyClaims_RAC	N/A		N/A		0.00 %	$ 0.00	N/A		N/A		N/A	

Figure 3.4 – Editing a Profile

To cancel editing of a profile without saving any changes entered since the most recent update, select the *Cancel* button. Following is a description for each of the configuration items in a profile.

3.1.4.1. Contact Group List

The columns grouped under Contact Groups detail the contact groups within the selected environment. Each contact group can be assigned a specific percentage of workload for each given organizational unit. The percentages in each column must add up to 100%. You will be given a warning if this is not the case. Each percentage can range from 0 to 100%. By default, each contact group/organizational group pair will be given an equal distribution of the workload.

3.1.4.2. Cost Method

The Cost Method radio boxes can be used to specify if the cost for a contact group is to be calculated as per minute of talk time or per contact. The total cost of handling contacts allocated to an org unit is reported together FTE requirements and contacts allocated in the FTE Distribution report provided in the Strategic Analysis page.

3.1.5. Save Profile

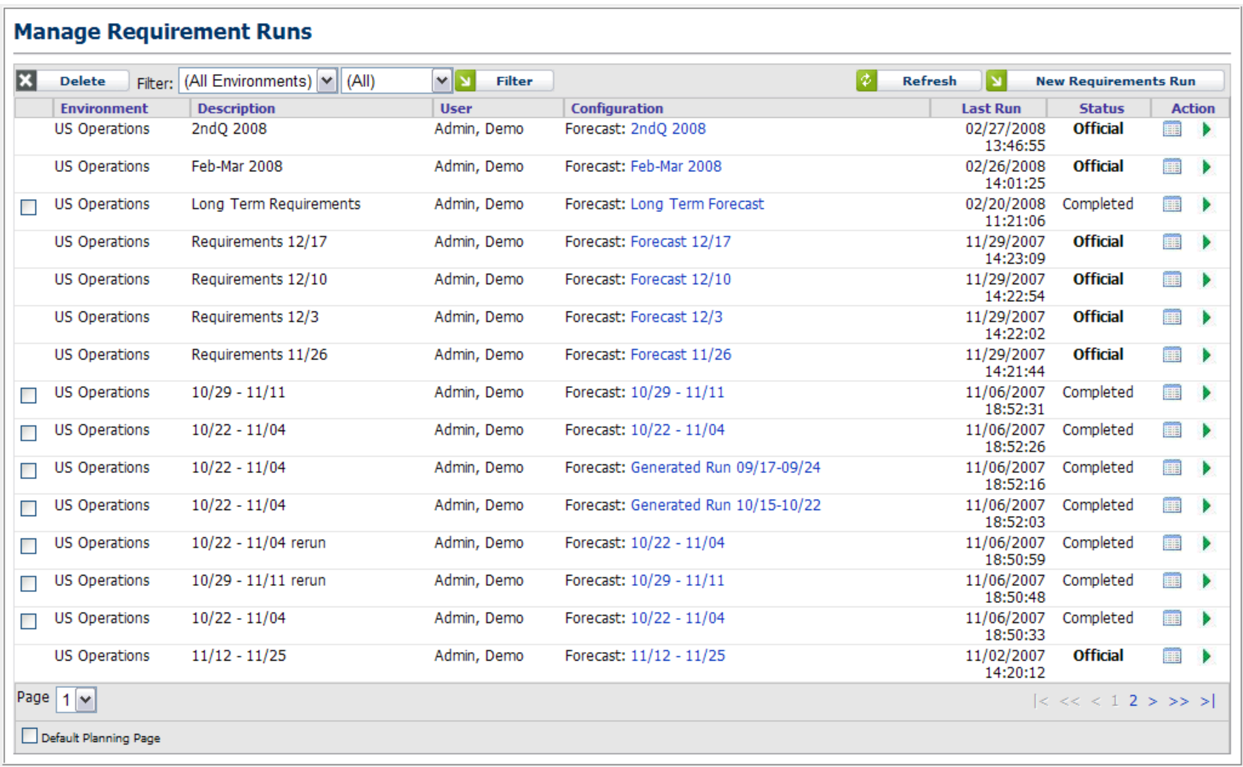
In order to save changes made to a profile, you must click the *Save* button. There are a number of reasons that saving a profile may not succeed. If invalid values or contradictory settings are specified by the user, one or more messages located near to the incorrect value or values will appear, asking the user to correct these values and resubmit the update. Furthermore, editing a profile while agent requirements are being generated is not allowed.

4. Planning

There are several modules related to configuration of agent requirements in an environment, as described in this section. Users with Administrator access level have access to all of the Planning Features described in this section. Users with Viewer access level may not have access to all of the modules featured.

4.1. Manage Requirement Runs

The *Manage Requirement Runs* module is shown in Figure 4.1. It can be found under the *Planning -> Planner* menu item. This page provides a list of user submitted requirement run jobs and their various states and configurations. The Environment, Description, User, Configuration, Last Run, Status and Action are displayed.



	Environment	Description	User	Configuration	Last Run	Status	Action
	US Operations	2ndQ 2008	Admin, Demo	Forecast: 2ndQ 2008	02/27/2008 13:46:55	Official	
	US Operations	Feb-Mar 2008	Admin, Demo	Forecast: Feb-Mar 2008	02/26/2008 14:01:25	Official	
☐	US Operations	Long Term Requirements	Admin, Demo	Forecast: Long Term Forecast	02/20/2008 11:21:06	Completed	
	US Operations	Requirements 12/17	Admin, Demo	Forecast: Forecast 12/17	11/29/2007 14:23:09	Official	
	US Operations	Requirements 12/10	Admin, Demo	Forecast: Forecast 12/10	11/29/2007 14:22:54	Official	
	US Operations	Requirements 12/3	Admin, Demo	Forecast: Forecast 12/3	11/29/2007 14:22:02	Official	
	US Operations	Requirements 11/26	Admin, Demo	Forecast: Forecast 11/26	11/29/2007 14:21:44	Official	
☐	US Operations	10/29 - 11/11	Admin, Demo	Forecast: 10/29 - 11/11	11/06/2007 18:52:31	Completed	
☐	US Operations	10/22 - 11/04	Admin, Demo	Forecast: 10/22 - 11/04	11/06/2007 18:52:26	Completed	
☐	US Operations	10/22 - 11/04	Admin, Demo	Forecast: Generated Run 09/17-09/24	11/06/2007 18:52:16	Completed	
☐	US Operations	10/22 - 11/04	Admin, Demo	Forecast: Generated Run 10/15-10/22	11/06/2007 18:52:03	Completed	
☐	US Operations	10/22 - 11/04 rerun	Admin, Demo	Forecast: 10/22 - 11/04	11/06/2007 18:50:59	Completed	
☐	US Operations	10/29 - 11/11 rerun	Admin, Demo	Forecast: 10/29 - 11/11	11/06/2007 18:50:48	Completed	
☐	US Operations	10/22 - 11/04	Admin, Demo	Forecast: 10/22 - 11/04	11/06/2007 18:50:33	Completed	
	US Operations	11/12 - 11/25	Admin, Demo	Forecast: 11/12 - 11/25	11/02/2007 14:20:12	Official	

Figure 4.1 – Manage Requirement Runs

4.1.1. Environment Selection

The *Filter* drop down lets the user filter the run list by environment. You may also filter the result with text. The (All) drop down contains methods to filter by text. Enter text here and you will be able to search through the description fields.

Clicking Filter will refresh the table, applying the filtering criteria.

Note: when a user has only one environment assigned to him or her, that environment is automatically selected by default.

4.1.2. Status

Several Status messages may be displayed in the Status column.

Status	Description
Queued	Job has been submitted, awaiting execution
Running	The job is currently executing.
Completed	The job has completed, you may view results
Published	The job has been published, thus preventing deletion and making available for Official.
Official	The job has been marked as official; it may be used for scheduling.
Error	An error occurred during execution, contact your administrator or check your parameters.

4.1.3. Actions

Several actions are available, which are dependent on the status of the run. When a job is Queued or Running you may *Cancel* the job, this will end execution and delete the results. When a job is Completed, Published or Official you may view the results in Strategic Analysis (See Section 4.2) or Re-Run the job. When a job is in an Error state you can Re-Run the job once you have determined the cause of the error.

4.1.4. Deleting Runs

You may delete one run at a time or multiple runs by checking the check boxes in the delete column and then clicking the *Delete* button. You may not delete Published or Official runs. Contact an administrator to delete such runs. The process is laid out in the *WFM v2 WFM Portal Administration Manual.*

4.2. Strategic Analysis

The Strategic Analysis module manages the results of a given agent requirements run. It is from here that one can view, chart and analyze the agent requirements. The module appears as shown in Figure 4.3.

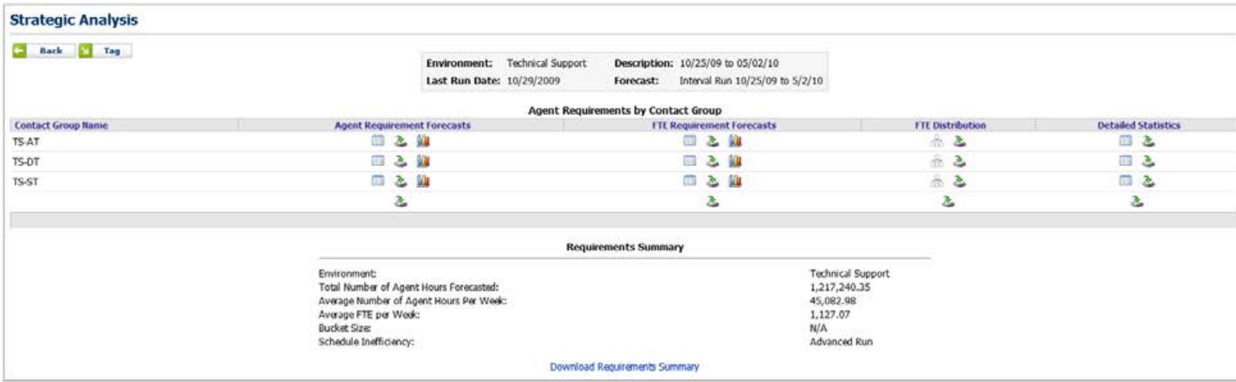


Figure 4.3 – Strategic Analysis

4.2.1. Contact Group Summary

The results are grouped by contact group. Each row in the table represents a single contact group. Clicking on the various reports on a contact group's row would present that report tailored to that particular contact group.

4.2.2. Requirements Summary

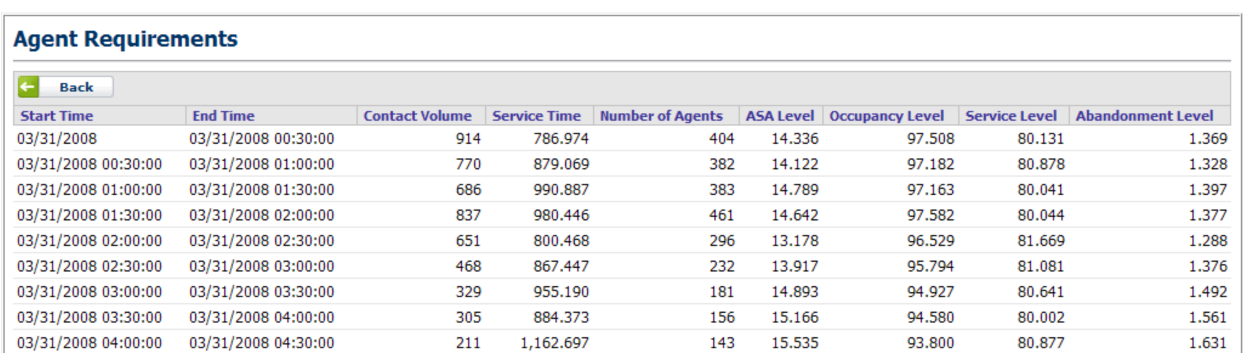
The Requirements Summary details the overall requirements run for the environment. Individual requirements summaries on a contact group level can be found by clicking on the links under the Detailed Statistics column. You may download the environment level summary by clicking on *Download Requirements Summary*.

4.2.3. Agent Requirement Forecasts

Agent requirements can be viewed as a table, downloaded to Excel or viewed as a chart. The left most icon brings up the *Agent Requirements Forecast View* (4.2.3.1). The middle icon downloads the report to Excel. The right icon displays the values as a chart.

4.2.3.1. Agent Requirement Forecast View

The Agent Requirements Forecast View table displays a number of useful columns: Start Date, End Date, Contact Volume, Service Time, Number of Agents, ASA Level, Occupancy Level, Service Level and Abandonment Level. Each row represents a bucket of time. Selecting the *Back* link will close the view.



Start Time	End Time	Contact Volume	Service Time	Number of Agents	ASA Level	Occupancy Level	Service Level	Abandonment Level
03/31/2008	03/31/2008 00:30:00	914	786.974	404	14.336	97.508	80.131	1.369
03/31/2008 00:30:00	03/31/2008 01:00:00	770	879.069	382	14.122	97.182	80.878	1.328
03/31/2008 01:00:00	03/31/2008 01:30:00	686	990.887	383	14.789	97.163	80.041	1.397
03/31/2008 01:30:00	03/31/2008 02:00:00	837	980.446	461	14.642	97.582	80.044	1.377
03/31/2008 02:00:00	03/31/2008 02:30:00	651	800.468	296	13.178	96.529	81.669	1.288
03/31/2008 02:30:00	03/31/2008 03:00:00	468	867.447	232	13.917	95.794	81.081	1.376
03/31/2008 03:00:00	03/31/2008 03:30:00	329	955.190	181	14.893	94.927	80.641	1.492
03/31/2008 03:30:00	03/31/2008 04:00:00	305	884.373	156	15.166	94.580	80.002	1.561
03/31/2008 04:00:00	03/31/2008 04:30:00	211	1,162.697	143	15.535	93.800	80.877	1.631

Figure 4.4 – Agent Requirement Forecast View

4.2.3.2. Agent Requirement Forecast Graph

The Agent Requirements Forecast Graph displays the agent requirement generation as a chart. You can also directly access the FTE Count Report as well as Service Level Optimization by changing the Report Type drop-down.

The charts can be downloaded by clicking on the *Download* icon at the top of the chart as an Excel, Word, PowerPoint, or PDF document by clicking the respective icon.

Printing Charts and Reports is done by clicking the *Print* icon at the top of the chart or report. The browser will prompt you to print the chart or report when the print icon is clicked.

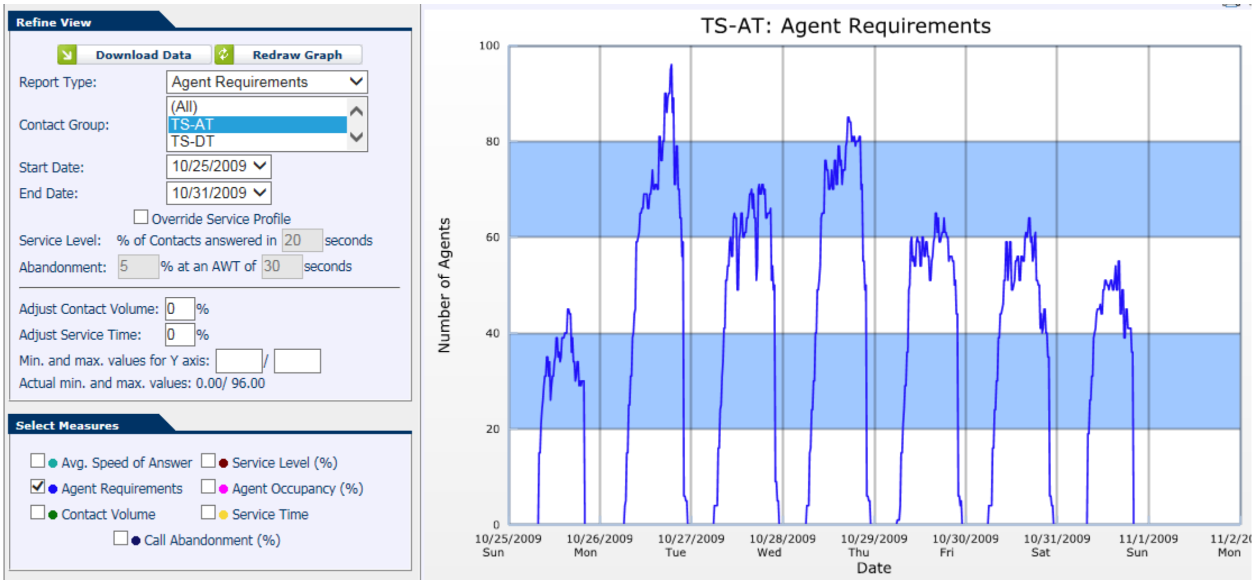


Figure 4.4 – Agent Requirement Forecast Graph

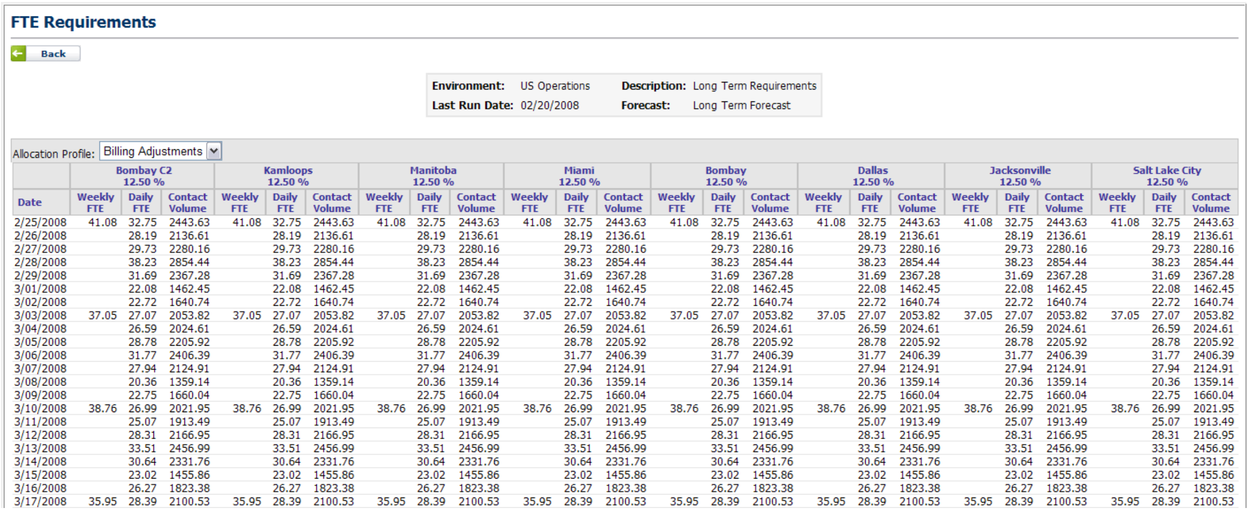
The chart interface will let you download the underlying data into Excel by clicking on the Download data button. You can switch between contact groups by selecting a contact group from the drop down list associated with *Group By*. To adjust the time range displayed, use the Start Date and End Date selection widgets.

The graph also permits on the fly adjustment of some of the requirement generation parameters. This can be used to slightly adjust Service Levels, Abandonment percentages or the underlying contact volume/service time. Make your adjustments to these values and click Redraw graph and you will see the adjustment in requirements.

Note: If you adjust values here, they are not saved to the requirements run. You should experiment with values here and then adjust your *Service Profile* to generate a new requirements run.

4.2.4. Org Unit Allocation

The Org Unit Allocation screen is reached by clicking the second icon in the FTE Requirement Forecasts column. This page displays a list of org units within the environment and their agent allocations on a daily basis through the run. This table also includes costs values so one can quickly gauge the cost levels on an org unit basis of this particular run. The list appears as shown in Figure 4.5.



FTE Requirements

Back

Environment: US Operations Description: Long Term Requirements
Last Run Date: 02/20/2008 Forecast: Long Term Forecast

Allocation Profile: Billing Adjustments

	Bombay C2 12.50 %			Kamloops 12.50 %			Manitoba 12.50 %			Miami 12.50 %			Bombay 12.50 %			Dallas 12.50 %			Jacksonville 12.50 %			Salt Lake City 12.50 %		
Date	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume	Weekly FTE	Daily FTE	Contact Volume
2/25/2008	41.08	32.75	2443.63	41.08	32.75	2443.63	41.08	32.75	2443.63	41.08	32.75	2443.63	41.08	32.75	2443.63	41.08	32.75	2443.63	41.08	32.75	2443.63	41.08	32.75	2443.63
2/26/2008		28.19	2136.61		28.19	2136.61		28.19	2136.61		28.19	2136.61		28.19	2136.61		28.19	2136.61		28.19	2136.61		28.19	2136.61
2/27/2008		29.73	2280.16		29.73	2280.16		29.73	2280.16		29.73	2280.16		29.73	2280.16		29.73	2280.16		29.73	2280.16		29.73	2280.16
2/28/2008		38.23	2854.44		38.23	2854.44		38.23	2854.44		38.23	2854.44		38.23	2854.44		38.23	2854.44		38.23	2854.44		38.23	2854.44
2/29/2008		31.69	2367.28		31.69	2367.28		31.69	2367.28		31.69	2367.28		31.69	2367.28		31.69	2367.28		31.69	2367.28		31.69	2367.28
3/01/2008		22.08	1462.45		22.08	1462.45		22.08	1462.45		22.08	1462.45		22.08	1462.45		22.08	1462.45		22.08	1462.45		22.08	1462.45
3/02/2008		22.72	1640.74		22.72	1640.74		22.72	1640.74		22.72	1640.74		22.72	1640.74		22.72	1640.74		22.72	1640.74		22.72	1640.74
3/03/2008	37.05	27.07	2053.82	37.05	27.07	2053.82	37.05	27.07	2053.82	37.05	27.07	2053.82	37.05	27.07	2053.82	37.05	27.07	2053.82	37.05	27.07	2053.82	37.05	27.07	2053.82
3/04/2008		26.59	2024.61		26.59	2024.61		26.59	2024.61		26.59	2024.61		26.59	2024.61		26.59	2024.61		26.59	2024.61		26.59	2024.61
3/05/2008		28.78	2205.92		28.78	2205.92		28.78	2205.92		28.78	2205.92		28.78	2205.92		28.78	2205.92		28.78	2205.92		28.78	2205.92
3/06/2008		31.77	2406.39		31.77	2406.39		31.77	2406.39		31.77	2406.39		31.77	2406.39		31.77	2406.39		31.77	2406.39		31.77	2406.39
3/07/2008		27.94	2124.91		27.94	2124.91		27.94	2124.91		27.94	2124.91		27.94	2124.91		27.94	2124.91		27.94	2124.91		27.94	2124.91
3/08/2008		20.36	1359.14		20.36	1359.14		20.36	1359.14		20.36	1359.14		20.36	1359.14		20.36	1359.14		20.36	1359.14		20.36	1359.14
3/09/2008		22.75	1660.04		22.75	1660.04		22.75	1660.04		22.75	1660.04		22.75	1660.04		22.75	1660.04		22.75	1660.04		22.75	1660.04
3/10/2008	38.76	26.99	2021.95	38.76	26.99	2021.95	38.76	26.99	2021.95	38.76	26.99	2021.95	38.76	26.99	2021.95	38.76	26.99	2021.95	38.76	26.99	2021.95	38.76	26.99	2021.95
3/11/2008		25.07	1913.49		25.07	1913.49		25.07	1913.49		25.07	1913.49		25.07	1913.49		25.07	1913.49		25.07	1913.49		25.07	1913.49
3/12/2008		28.31	2166.95		28.31	2166.95		28.31	2166.95		28.31	2166.95		28.31	2166.95		28.31	2166.95		28.31	2166.95		28.31	2166.95
3/13/2008		33.51	2456.99		33.51	2456.99		33.51	2456.99		33.51	2456.99		33.51	2456.99		33.51	2456.99		33.51	2456.99		33.51	2456.99
3/14/2008		30.64	2331.76		30.64	2331.76		30.64	2331.76		30.64	2331.76		30.64	2331.76		30.64	2331.76		30.64	2331.76		30.64	2331.76
3/15/2008		23.02	1455.86		23.02	1455.86		23.02	1455.86		23.02	1455.86		23.02	1455.86		23.02	1455.86		23.02	1455.86		23.02	1455.86
3/16/2008		26.27	1823.38		26.27	1823.38		26.27	1823.38		26.27	1823.38		26.27	1823.38		26.27	1823.38		26.27	1823.38		26.27	1823.38
3/17/2008	35.95	28.39	2100.53	35.95	28.39	2100.53	35.95	28.39	2100.53	35.95	28.39	2100.53	35.95	28.39	2100.53	35.95	28.39	2100.53	35.95	28.39	2100.53	35.95	28.39	2100.53

Figure 4.5 – Organizational Unit Allocation

Clicking the Back button will take the user back to the *Strategic Analysis* page.

4.2.5. Detailed Statistics

The Detailed Statistics screen provides a summary of the run on a contact group level. You can switch between contact groups by changing the selected contact group. You may also download the report to be saved in Excel. This can be seen in Figure 4.6.

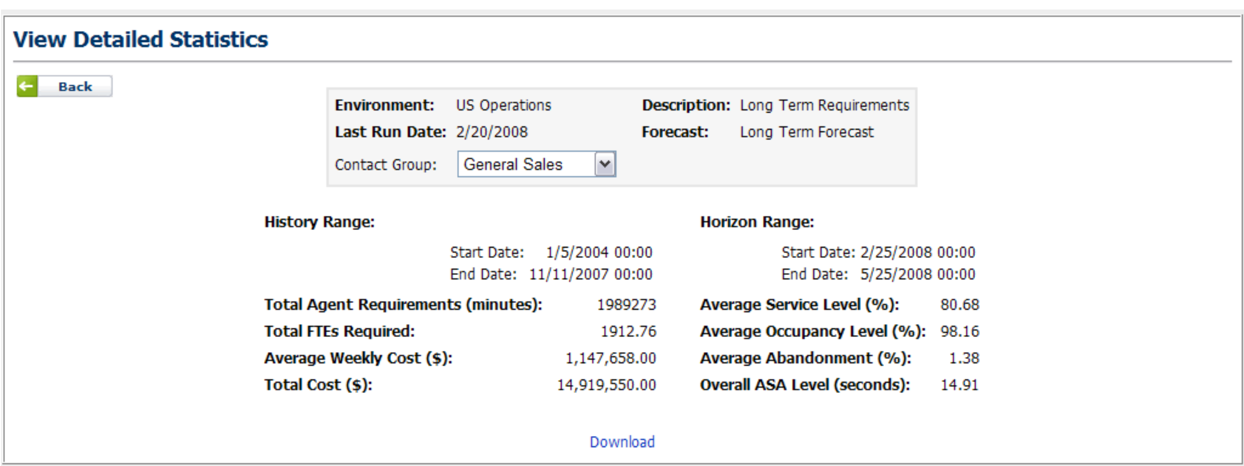


Figure 4.6 – Detailed Statistics

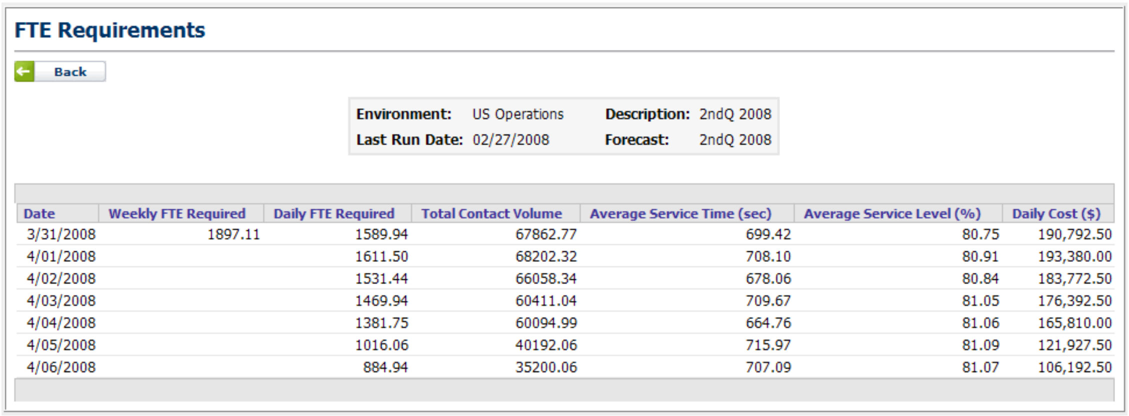
Selecting the *Back* button will close these details and return you to the *Strategic Analysis* page.

4.2.6. FTE Requirement Forecasts

FTE requirements can be viewed as a table, downloaded to Excel or viewed as a chart. The left most icon brings up the *FTE Requirements Forecast View* (4.2.6.1). The second icon brings up the Org Unit Allocation table (4.2.4). The third icon downloads the report to Excel. The right icon displays the values as a chart.

4.2.6.1. FTE Requirements View

The FTE Requirements View displays a table of daily FTE totals with Weekly FTE requirement summaries. Each row in the table represents a single day. Columns for Weekly FTE Requirement, Daily FTE Requirement, Total Contact Volume, Average Service Time, Average Service Level and the Daily Cost (based off your agent costs tables) are provided. These same values can be downloaded into Excel using the download feature of the *Strategic Analysis* page.



FTE Requirements

Back

Environment: US Operations Description: 2ndQ 2008
Last Run Date: 02/27/2008 Forecast: 2ndQ 2008

Date	Weekly FTE Required	Daily FTE Required	Total Contact Volume	Average Service Time (sec)	Average Service Level (%)	Daily Cost ($)
3/31/2008	1897.11	1589.94	67862.77	699.42	80.75	190,792.50
4/01/2008		1611.50	68202.32	708.10	80.91	193,380.00
4/02/2008		1531.44	66058.34	678.06	80.84	183,772.50
4/03/2008		1469.94	60411.04	709.67	81.05	176,392.50
4/04/2008		1381.75	60094.99	664.76	81.06	165,810.00
4/05/2008		1016.06	40192.06	715.97	81.09	121,927.50
4/06/2008		884.94	35200.06	707.09	81.07	106,192.50

Figure 4.7 – FTE Requirements View

4.2.6.2. FTE Requirements Graph

FTE Requirements may also be displayed as a chart. The interface works in the same way as the Agent Requirement Forecast Graph (4.2.3.2), except that the Report Type defaults to FTE Counts.

The charts can be downloaded by clicking on the *Download* icon at the top of the chart as an Excel, Word, PowerPoint, or PDF document by clicking the respective icon.

Printing Charts and Reports is done by clicking the *Print* icon at the top of the chart or report. The browser will prompt you to print the chart or report when the print icon is clicked.

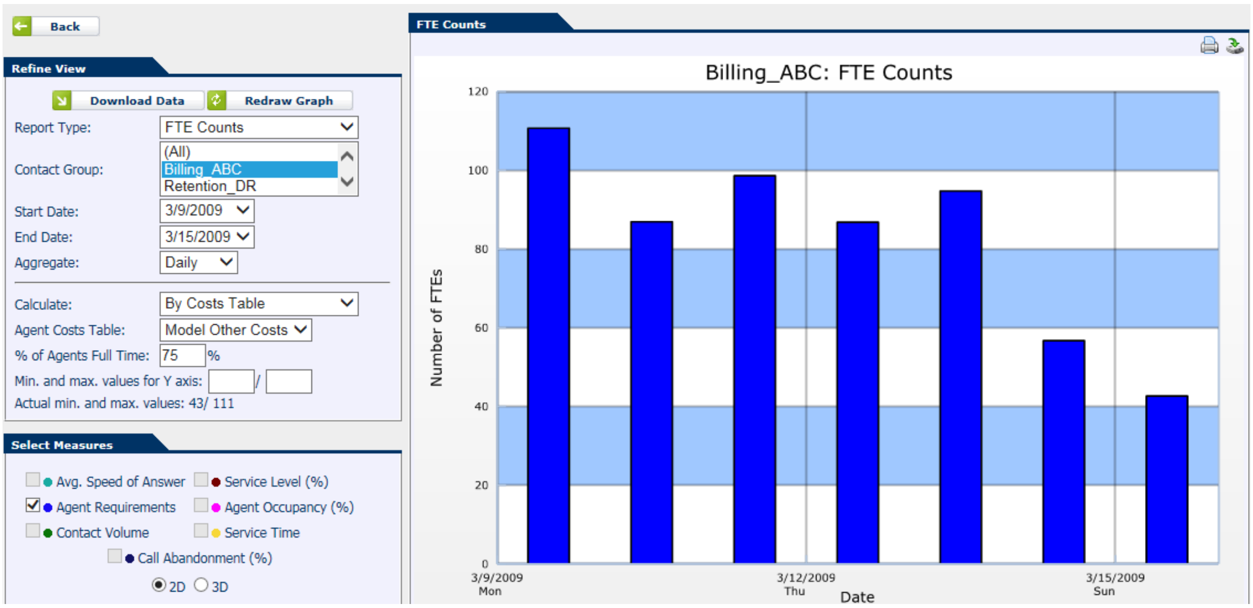


Figure 4.8 – FTE Requirements Graph

You can adjust the cost structure associated with this report by using the Calculate drop down. You may calculate by using a selected Agent Costs Table or by manually entering cost values as seen below:

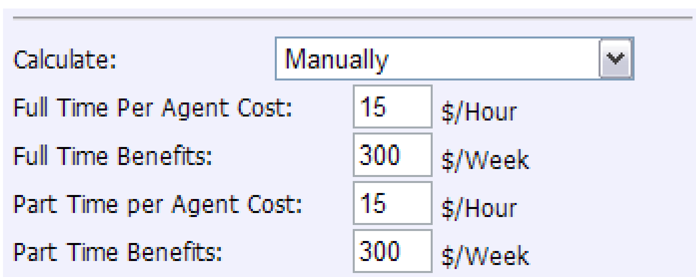


Figure 4.9 – Agent Costs

Note: If you adjust values here they are not saved to the requirements run. You should experiment with values here and then adjust your *Service Profile* to generate a new requirements run.

4.2.6.3. Refine View

The Refine View section of the left side configuration lets the user switch between Contact Groups, Report Type, the displayed Time Range as well as lets the user collapse the selected data into a Day or a Week.

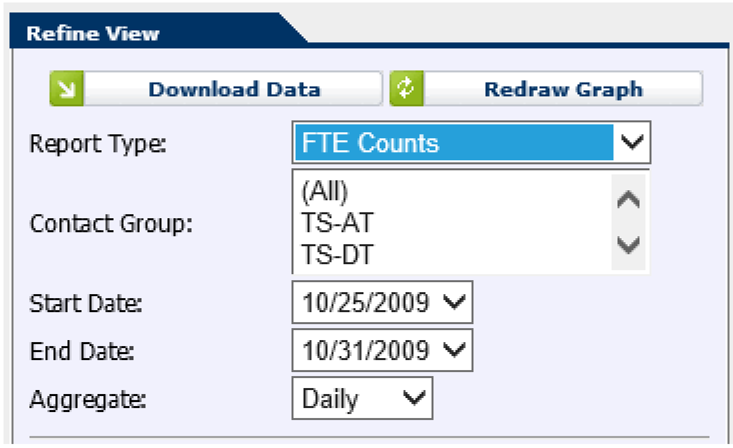


Figure 4.10 – Refine View

4.2.6.4. Select Measures

This section provides a way of adjusting the items being displayed in the chart. It also serves as a legend for the chart as the color next to the item name is the color of the line in the chart. Simply check which items you would like to graph and click *Redraw Graph*.

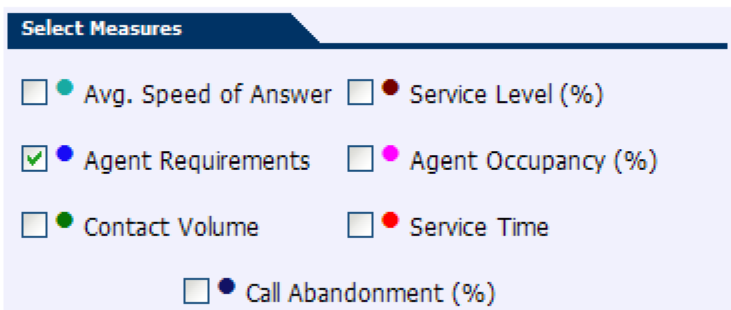


Figure 4.11 – Select Measures

4.3. New Requirements Run

In order to generate a new requirement run, the user must submit a new job using the New Requirements Run module. Click *Planning -> Planner -> New Requirements Run* to reach this module. The module is shown in Figure 4.12.

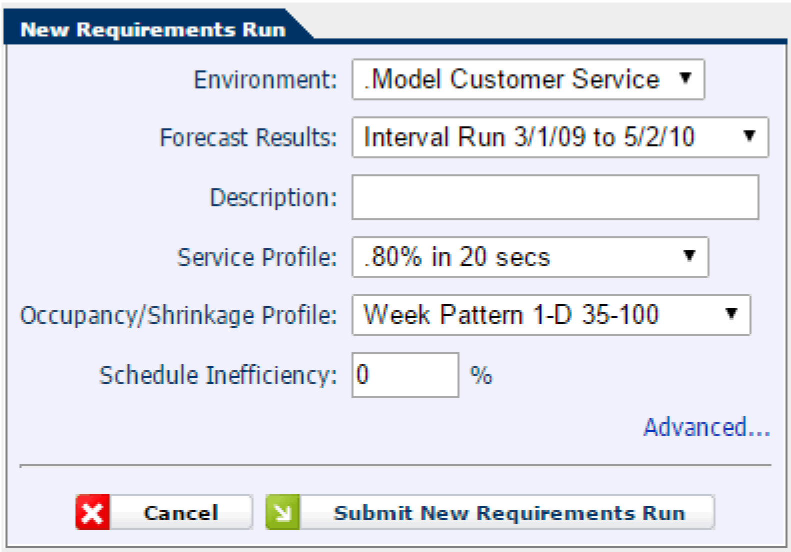


Figure 4.12 – New Requirements Run

4.3.1. Configuration

The user must select an *Environment*, *Forecast Results Run*, *Service Profile* and provide a *Description* at a minimum. An Occupancy/Shrinkage Profile may also be specified if one has been created.

Clicking *Submit New Requirements Run* will create a new job and display this in the *Manage Requirement Runs* module. Cancel will take you back to the *Manage Requirement Runs* module.

4.3.2. Advanced Configuration

The Advanced Configuration display is reached by clicking *Advanced*. This page provides granular configuration of a requirements run down to the Contact Group level as shown in Figure 4.13. You can specify the Service and Shrinkage Profiles for each Contact Group. You may also exclude a particular contact group to simply use the default settings.

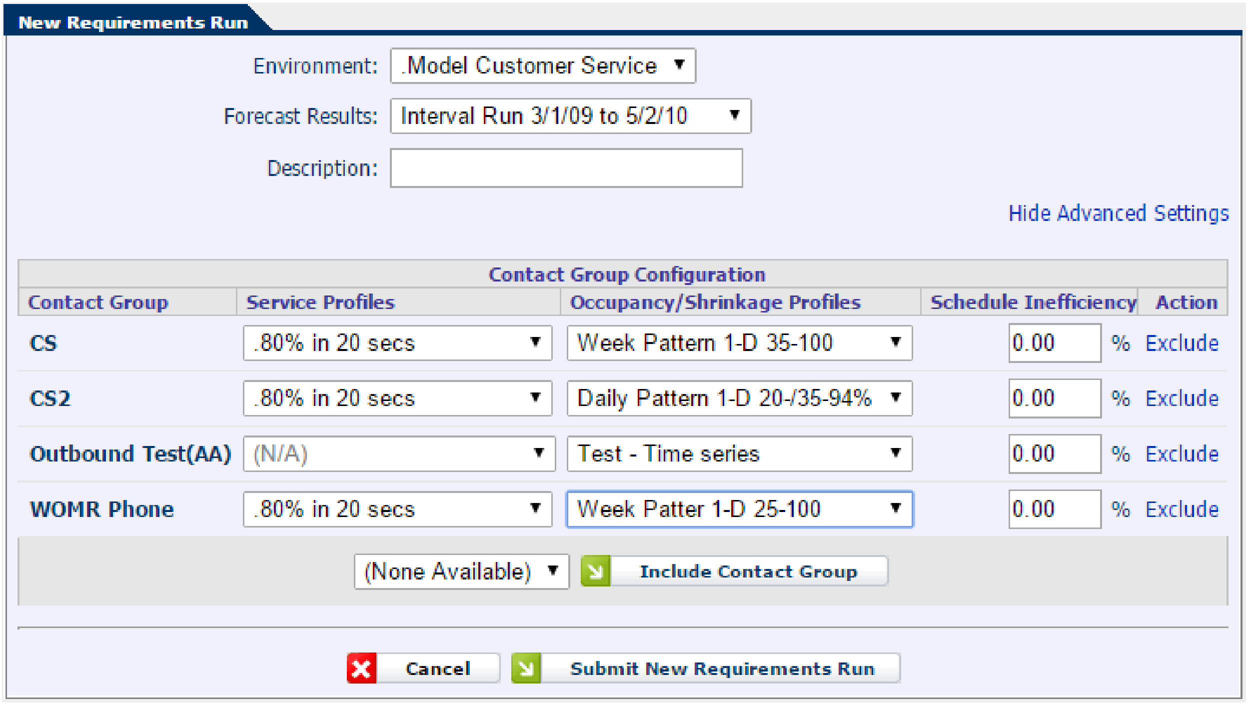


Figure 4.13 – Advanced Configuration

Once the configuration has been set, simply click Submit New Requirements Run to submit the job as you would do with the Basic module.

4.4. What-If Comparison

This feature is accessible by selecting at least one run by checking the box to the left of the environment and clicking on the Compare button from the Manage Requirement Runs page, as shown in Figure 4.14. Up to five runs may be compared.

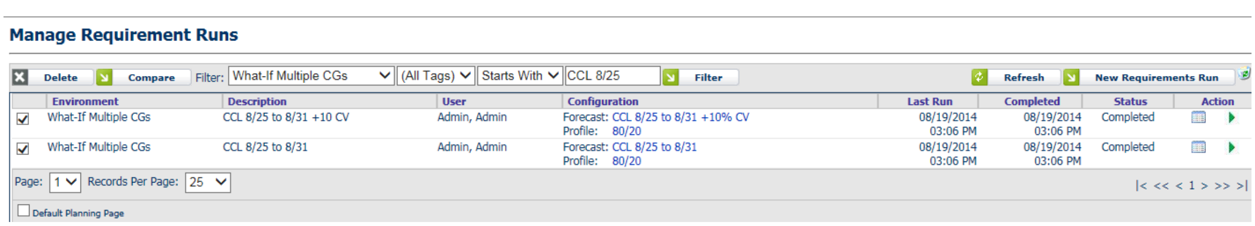


Figure 4.14 – Manage Requirement Runs

To use the functionality, after the page loads with the run information for the run(s) selected, the user can add additional runs to compare in the Select Run area by highlighting the run and then clicking on the green "+" icon on the right. This will add the run to the list of runs to compare. After selecting each run, the page will reload with data from the run added. If desired, select other measure in the Select Measures area and click the Redraw button. Runs may be removed by clicking on the red "x" icon to the right of the run in the Description section.

ASA, SL, Ab%, agent requirements, FTE, agent occupancy, contact volume and AHT forecasts may be compared for the Planner runs.

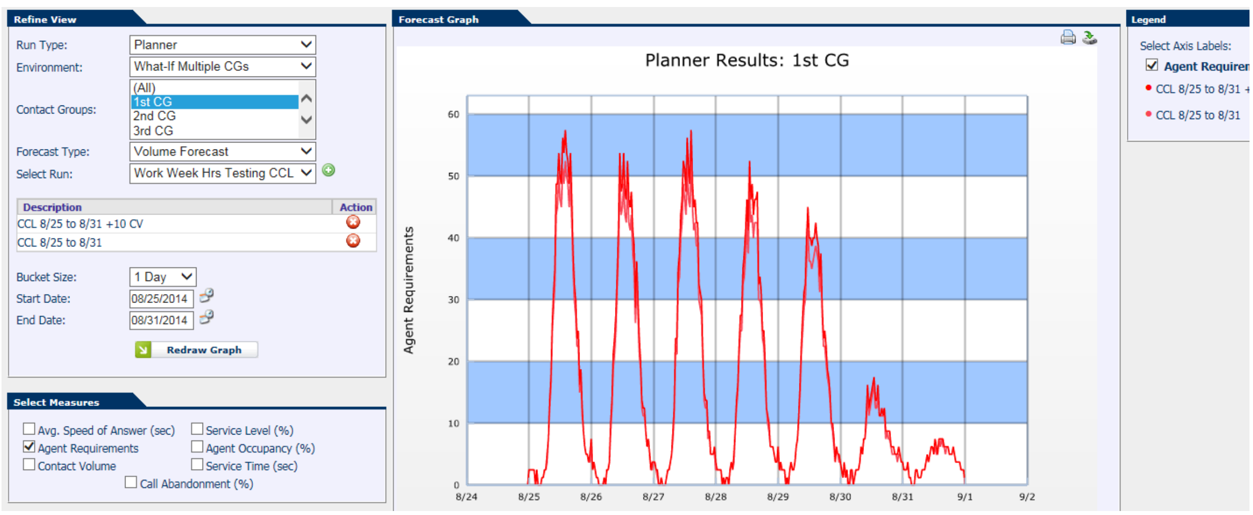


Figure 4.15 – What-If Refine View / Forecast Graph

5. Upload Forecast

The *Upload Forecasts* module appears as in Figure 5.1. The module contains three components that enable configuration of the forecasts to be uploaded. These are described in the following sections. Forecasts can be uploaded for both inbound and outbound call types. Outbound will offer the choice to use either right part connect data or connect data.

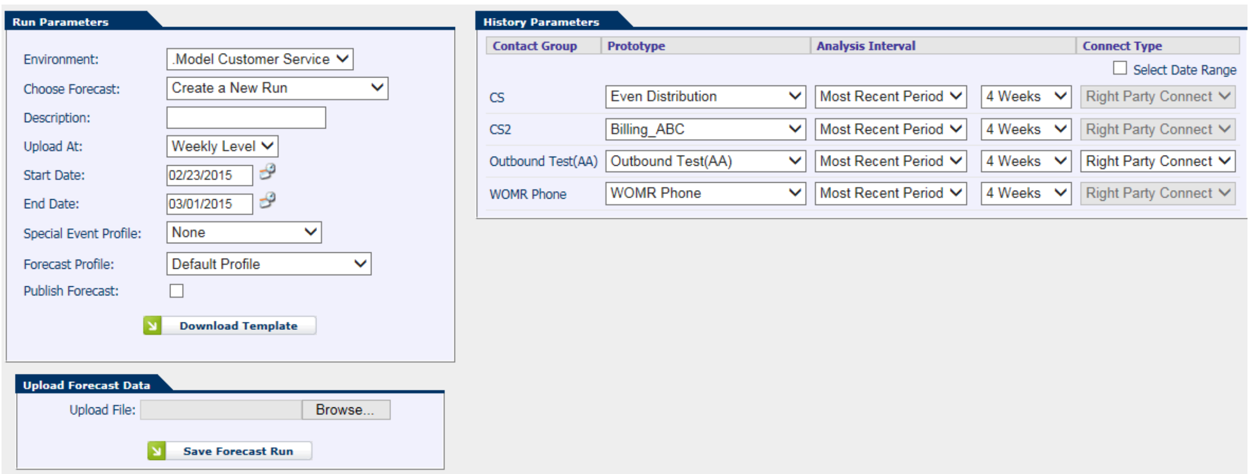


Figure 5.1 – Upload Forecasts

5.1. Run Parameters

The Run Parameters component is used to configure the high-level parameters for the forecast run that is created when the forecast data is uploaded. The data must be identified with an environment, a start and end date, and a bucket size. Optionally, a Special Event profile may be selected to be applied to the uploaded data. Once these parameters are configured, a template for the data may be downloaded by clicking on the *Download Template* button. The *Publish Forecast* option may be checked to have the system automatically publish the new forecast run that is created. If this option is not checked, the user may still publish the new run at a later time, by viewing the Forecast run in the *Manage Forecast Runs* page (refer to the *WFM v2 Forecaster Web Site User Manual* for more information).

5.2. History Parameters

The History Parameters component is used to configure how the upload process is to build interval forecasts based on the uploaded forecast data, which may be at a higher bucket size. The following fields may be configured for each Contact Group.

5.2.1. Prototype Contact Group

By default, the existing data for a contact group will be used to develop the interval pattern from the uploaded forecast data. A user may choose to use the data from a different Contact Group as a pattern, which is especially useful when there is, in fact, no current data for the specific Contact Group. Another option is Even Distribution which is to be used when no interval level history is available. This option will distribute the data evenly over every interval.

5.2.2. Analysis Interval

The Analysis Interval is the period of time over which the reference data will be examined to determine the interval pattern. The default selection is Most Recent Period, which additionally requires a number of weeks to be selected. The default number of weeks is 4. This reflects the assumption that the future interval pattern will be similar to the average pattern of the most recent four weeks. The other options for Analysis Interval are Previous Year, which averages the pattern available with the start date one year before over the number of weeks selected, and Entire History, which includes all available historical data in the prototype contact group or by date range.

5.2.3. Start Date and End Date

The *Start and End Date* fields are updated to reflect the selection in the Analysis Interval field. The user may further refine the date range used to generate the interval pattern by modifying one or both of the Start and End dates.

5.3. Upload Forecast Data

The Upload Forecast Data component allows selection of the comma-delimited text file containing the forecast data to be uploaded. Clicking on the Save Forecast Run button uploads the data and launches the process to derive the interval-level data, creating a new Forecast Run to contain the data, and automatically publishing the run when the Publish Forecast option is checked.